



LOUDOUN
COUNTY
DEPARTMENT
OF PLANNING

ROUTE 28 BUSINESS OUTREACH PROJECT: HIGHLIGHTS FROM THE RESULTS REPORT

July 27, 2009

Highlights of the Route 28 Results Report

Background

- The Route 28 corridor is emerging as an aerospace, technology, communications, and government-contract corridor that is home to major corporations including Orbital Sciences, GeoEye, and most recently Raytheon. Due to its many locational advantages, the corridor is strategically positioned to emerge as an international gateway for the Washington metropolitan region and a major employment destination for national and international businesses. However, there has been concern that the corridor has not yet developed fully to the County's vision and underdevelopment might be limiting the County's potential to generate even greater tax revenues and increase the percentage of the County's tax base from commercial development. The reasons for this may be complex and many.

Route 28 Business Outreach Project

- In order to gain a better understanding of the issues facing the corridor, the Loudoun County Board of Supervisors resolved to convene a Forum with business and industrial property stakeholders from the Route 28 Corridor for the purpose of better understanding the key issues affecting economic development. The Board further resolved to prepare a results report summarizing the outcome of this "stakeholder dialogue". The report would identify potential options for the Board to discuss and consider that might result in a vision and strategic plan for the Route 28 Corridor.
- From this direction, a series of stakeholder interviews were conducted from mid-March to mid-April in preparation for the Board Forum. County Staff identified 43 key stakeholders for individual interviews representing large landholders, developers, homeowners associations, and other interested agencies and groups. The commercial property owners and developers selected to be interviewed represented over 3,000 acres, or almost 40% of the land area in the corridor, in this case the corridor being synonymous with the Route 28 Tax District boundaries.
- The Board held the Forum on Monday, April 13th, of this year with over 100 people in attendance representing 52 businesses and organizations. The Forum, titled "Route 28-Shaping Our Economic Future," was hosted by Orbital Sciences Corporation at their complex in the corridor. Building on the interplay between Route 28 and the Dulles Airport, Dr. Stephen Appold, a Visiting Scholar and Senior Research Associate at the Frank Hawkins Kenan Institute for Private Enterprise at the University of North Carolina at Chapel Hill, was invited to speak to the group. Dr. Appold presented his research on the "aerotropolis" as an economic development model. Following Appold's presentation and with facilitation by Economic Development Staff, the Board posed questions to the Forum participants about their vision, views, and issues with the Route 28 Corridor.
- The Route 28 Results Report was released on June 2nd. The report summarized perceptions of the corridor from those interviewed, the current state of development in the corridor, the challenges of development in the corridor, and ways that the County could improve its development potential.

Present Challenges in the Route 28 Corridor

- People overwhelmingly believed the corridor suffers from an image and prestige problem that is making it difficult to compete with other corridors in the region. When asked to describe the corridor, stakeholders used words and phrases such as “disjointed,” “disorganized,” “inconsistent,” “piecemeal,” “having multiple personalities,” “suffering from a lack of identity,” and being the “backyard for the Ashburn and Sterling Communities.” Those interviewed noted that this is in contrast to Fairfax County, where a more consistent and quality development pattern is observed.
- Many people also stated that properties are not being appropriately planned and developed to their highest and best use. Low-rise industrial and commercial uses have consumed prime and marketable land for Class A office adjacent to the highly visible Route 28 roadway. Those interviewed attributed this to a number of factors:
 - ✓ The market has yet to fully mature for Class A office;
 - ✓ Current development is simply reflecting the majority of existing zoning which supports predominantly by-right industrial development options;
 - ✓ The Revised 1993 Zoning Ordinance does not include enough incentives for those property owners under the 1972 Zoning Ordinance to view zoning conversion as a viable trade-off;
 - ✓ Small, unconsolidated parcels, especially south of Waxpool Road, are making it difficult for developers to come in with unified development proposals;
 - ✓ The County’s Destination Retail Overlay, whose boundaries are defined by the County’s comprehensive plan, supports big-box retail adjacent to Route 28, conflicts with the County’s vision of attracting Class A office to the corridor and sends a confusing message to developers as to what is the most preferred use along the roadway; and
 - ✓ The County’s Keynote Employment land use designation along a majority of the corridor does not allow for the kind of amenities necessary to recruit national and international businesses and employees to the County. As a result, they described the corridor as lacking any real “places” that offer the kind of cultural, entertainment, and retail amenities that appeal to younger and single professionals who work in nearby office developments.

Present Strengths in the Route 28 Corridor

- Despite these challenges, people were positive on the corridor’s long-term potential for Class A office development. People noted that:
 - ✓ The area offers a highly-educated and diverse labor pool for employers, diverse housing options, good schools, and quality health care for their employees, and an affluent customer base for business goods and services;
 - ✓ Businesses locating adjacent to Route 28 have the advantage of high visibility for their employees and customers;
 - ✓ Transportation improvements in the corridor are providing employers timely access to Dulles Airport and the interstate network for commuting;
 - ✓ Dulles Airport is a major asset and economic engine for the County and there are opportunities to target businesses who desire to be closer to the airport and the interstate network in order to take advantage of access to a timely and cost-

- efficient goods and services distribution network and employee mobility to east coast, national, and international destinations; and
- ✓ The current Board is taking a proactive stance with economic development in the corridor.

Future Vision for the Route 28 Corridor

- When those interviewed were asked what their vision for the Route 28 Corridor was, many suggested the need for a more detailed master plan and strategy that provides a clear vision for achieving its highest and best use.
- When asked what that vision might look like, stakeholders described the future corridor as having:
 - ✓ A “Brand” or name that identifies the corridor as a premier international gateway to Loudoun County and the larger region and a hub for regional, national, and international business and trade;
 - ✓ An attractive gateway at the southern end of the corridor that facilitates investment to the north;
 - ✓ Strong research, education, and technology industry sectors;
 - ✓ Premier, larger-scale, Class A office integrated with higher quality retail adjacent to the highly-visible Route 28 and low-rise, lower-intensity industrial development located away from Route 28 and towards Dulles Airport;
 - ✓ Clusters of higher-intensity, pedestrian-oriented, business nodes;
 - ✓ Mixed-use development nodes that take advantage of future metrorail stations where employees can live near their work, offer diverse housing choices with a high quality of design, and includes workforce housing;;
 - ✓ Keynote Employment office campuses;
 - ✓ Places that are destinations with attractions, culture, and entertainment that offer greater weekend and nighttime activity for office and Dulles Airport employees; and
 - ✓ A linear park on the Broad Run that provides opportunities for employees to bike and walk to work while preserving the river as a natural resource asset.
- Stakeholders also envisioned a complete and interconnected regional road and transit network that links Class A office development along the corridor to the planned metro stations and Dulles Airport and provides greater commute options for employees from the east.

1972 Zoning Ordinance versus the Revised 1993 Zoning Ordinance

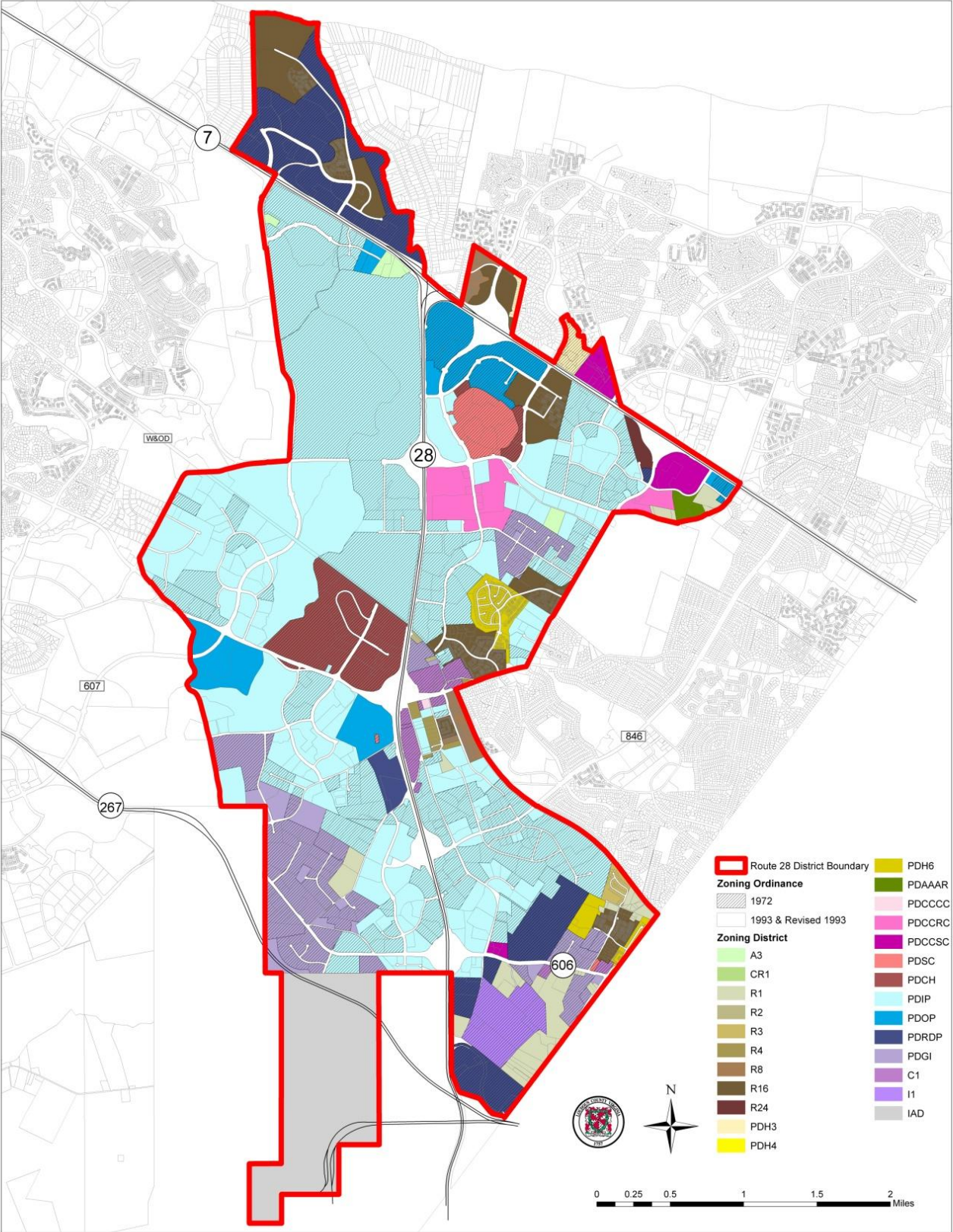
- As part of the Route 28 stakeholders outreach project, the Board of Supervisors wanted to find out why more commercial property owners are not converting from the 1972 Zoning Ordinance to the Revised 1993 Zoning Ordinance. The results from the dialogue with stakeholders show that there is no one clear answer.
- Many stated that the Revised 1993 Zoning Ordinance includes more restrictive regulations that reduce a property’s buildable area and forces costly structured parking that cannot be offset by the maximum FARs allowed by-right in the zoning districts. This in turn is limiting the land’s economic potential and driving up development costs.

- Some also noted that property owner conversion to the Revised 1993 Zoning Ordinance requires a lengthy and cumbersome legislative approval process that makes it difficult for developers and property owners to quickly respond to market advantages. Without a detailed plan for the corridor, the legislative process is also a costly one whose outcome is uncertain. Consequently, property owners do not see an advantage to losing the flexibility allowed in the 1972 Zoning Ordinance and putting the time and expense necessary for a rezoning until they are sure the Revised 1993 Zoning Ordinance offers a clear advantage for a prospective user.

Options for the development of a Route 28 Plan

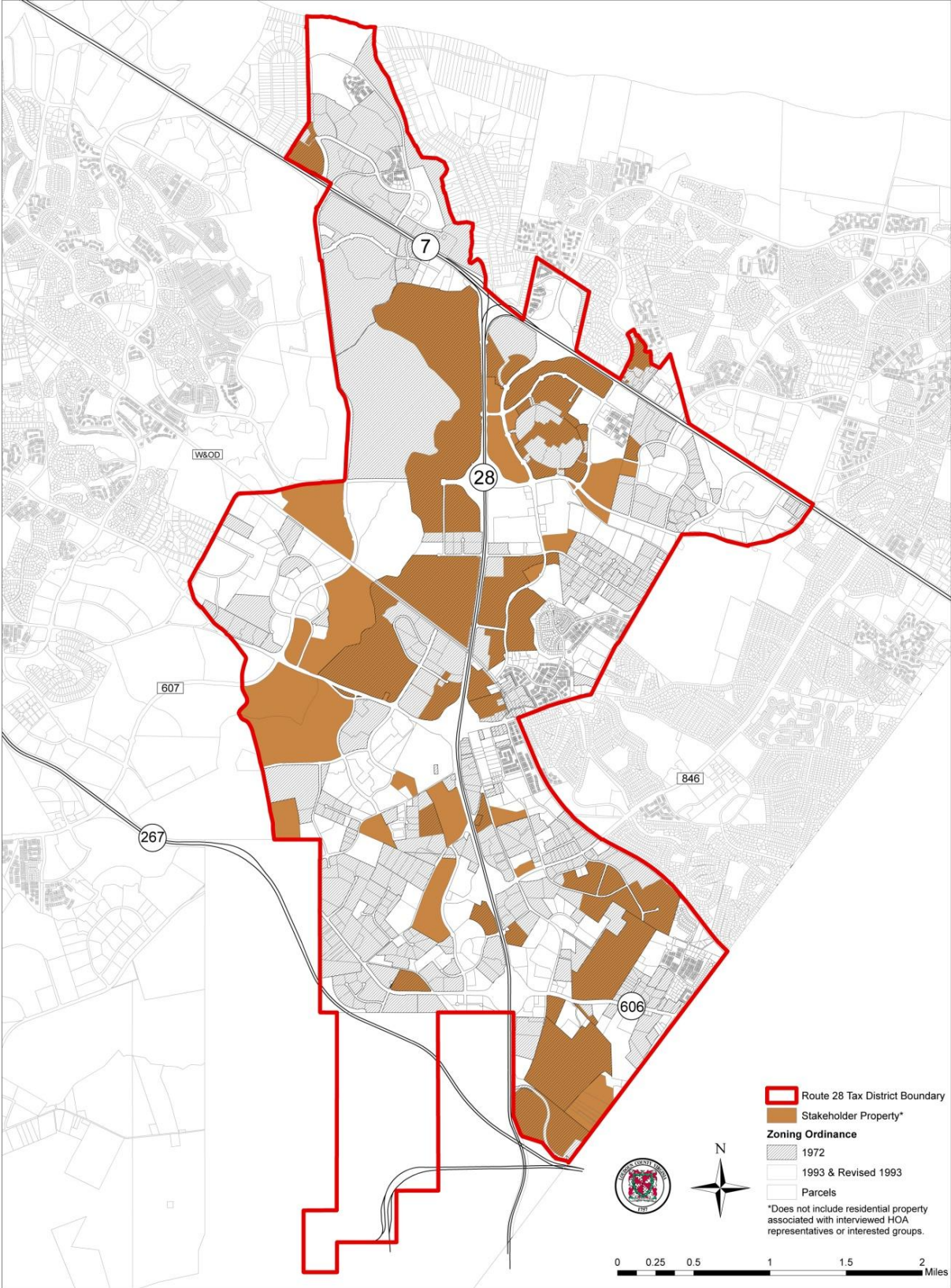
- The comments from the outreach process were synthesized and incorporated into a SWOT (Strengths, Weaknesses, Threats, and Opportunities) matrix. For purposes of analysis, the SWOT statements were categorized under four topic areas: Economics/Market, Transportation, Design, and Regulatory/Programmatic. From the SWOT, a number of guiding principles were developed, subject to change through any future public participation processes and from any conclusions derived from future market studies or analyses. The intent of the guiding principles and market studies could then be used to model one or more options to help create a long-term vision and strategic plan for economic development in the corridor. These options, included in the report, were:
 1. The development of an individualized plan specific to the unique challenges and opportunities within the corridor. Establishing such a plan would ascertain and ascribe land to its highest and best uses, encourage more efficient and desirable forms of development and development patterns for the County, create new opportunities for growth and sustained economic development; and reduce the uncertainty in the legislative review process by communicating clearly and specifically to property owners, developers, and the public the County's vision, goals, and objectives for development in the corridor. Such a plan would also seamlessly integrate planning, zoning, and economic development into a coherent and viable strategy.
 2. The continued pursuit of a Comprehensive Plan Amendment (CPAM) that was directed by the Board of Supervisors on February 3, 2009, to examine the Keynote Employment Policies of the Revised General Plan as they relate to the Route 28 Corridor. Specifically, the CPAM would consider retaining or changing the current Keynote Employment planned land use designation in the corridor for those properties from Route 7 to the Fairfax County line and between Atlantic Boulevard and the Broad Run.
 3. The initiation of regulatory and programmatic changes to induce development and encourage those property owners to convert their properties from the 1972 Zoning Ordinance to the Revised 1993 Zoning Ordinance.

Figure 1: Existing Zoning Districts and Governing Zoning Ordinances in the Route 28 Tax District



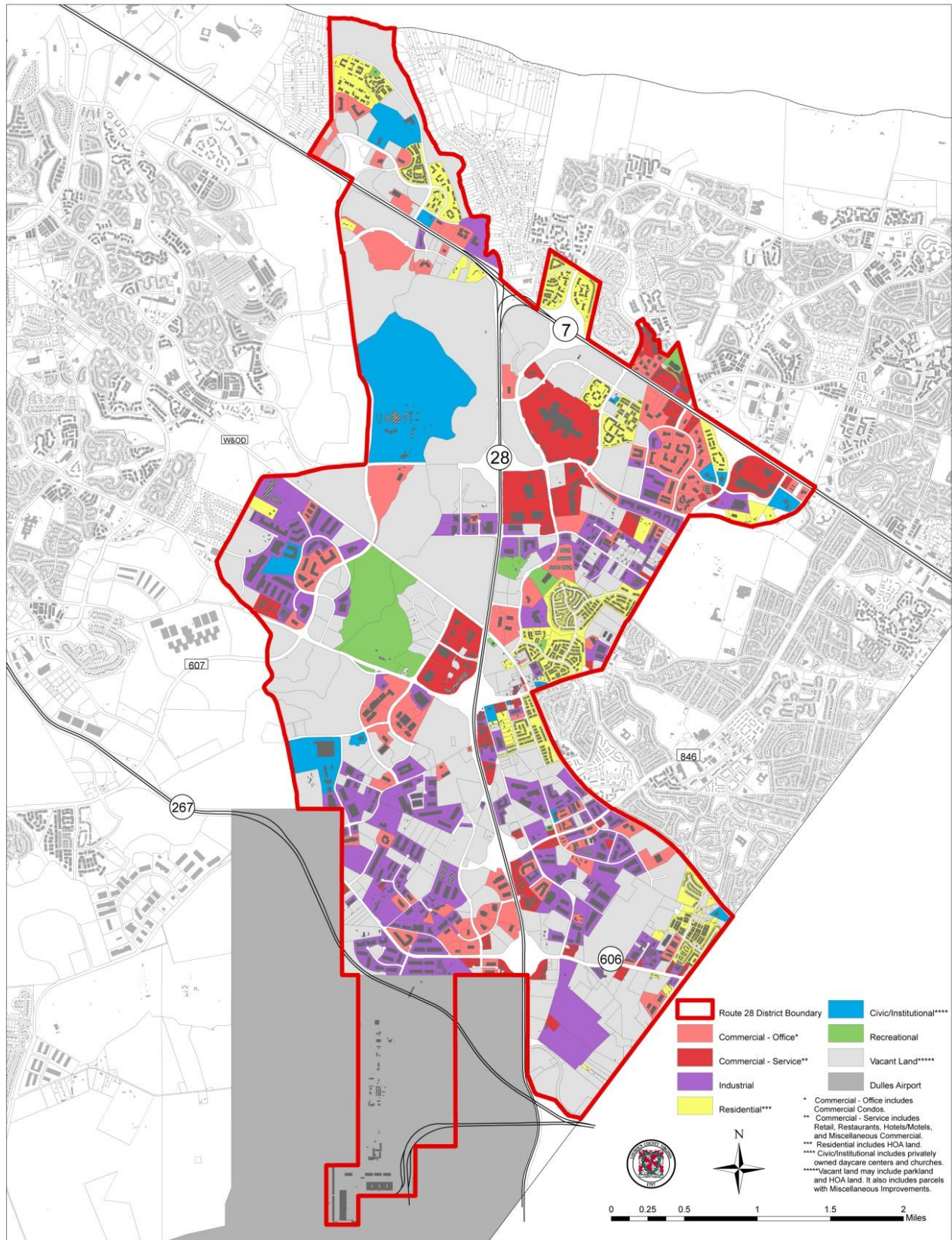
Prepared by Loudoun County Planning Department. April 9, 2009. All boundaries are approximate.

Figure 2: Parcels Owned by Interviewed Stakeholders in the Route 28 Tax District*



Prepared by Loudoun County Planning Department, May 2009. All boundaries are approximate.

Figure 3: Existing Land Uses in the Route 28 Tax District¹



Prepared by Loudoun County Planning Department, May 2009. All boundaries are approximate.

¹The existing land uses were categorized using 2008 occupancy codes from the Office of the County Assessor.

Appendix A: Analysis of Stakeholder Perceptions

SWOT

The comments from stakeholders have been synthesized and incorporated into a SWOT (Strengths, Weaknesses, Threats, and Opportunities) matrix. For purposes of analysis, the SWOT statements have been categorized under four topic areas: Economics/Market, Transportation, Design, and Regulatory/Programmatic. The SWOT contains summary statements of the corridor's strengths that should be maintained and leveraged, weaknesses that should be remedied or fixed, opportunities that should be prioritized and optimized, and threats that should be countered. A summary of the SWOT Analysis is included in Appendix A.

From the SWOT, a number of guiding principles have been drafted. These principles can be used to model one or more of the options listed in the following section. It is important to note that the principles are a starting point. The principles reflect the comments heard from stakeholders who engaged in the project. These stakeholders, however, do not represent all the citizens and groups who have a stake and interest in corridor development. As such, the principles are not static, but are intended to be dynamic and subject to change. As corridor strategies are pursued, more public participation is recommended. From this public participation process, the principles may be reinforced, refined, changed, or eliminated. These principles should also be refined subsequent to the conclusions of any future market studies or analyses conducted for the corridor.

Guiding Principles

1. The County's land use plan for the corridor should reflect market potential

The Route 28 corridor is strategically positioned to attract economic development due to these locational advantages:

- Proximity and investment to improved highway, air transport, and future mass transit networks for cost-efficient and timely distribution of goods and services, employee mobility, and greater workforce commute options;
- Proximity to a highly-educated, diverse workforce and affluent customer base;
- Proximity to diverse housing types, good schools, and quality health care; and
- High visibility and accessibility for businesses.

These advantages, however, are being offset by the corridor's current land development pattern and competitive disadvantages with other corridors in the region, (including Fairfax County's portion of the Route 28 corridor and the Dulles Toll Road), which appear to be more successful in attracting key businesses. It is also unclear how the ability to capture certain markets in the corridor may be inhibited by competing developments both within the County and the larger region.

The breadth of stakeholders' comments clearly shows the inextricable link between successful economic development and sound land use/transportation planning and design. The County's planning for the corridor should reflect its market potential and a market study should be used to model any planning efforts conducted for the corridor. Doing so positions the corridor to take advantage of its strengths and competitive advantages with other corridors and employment centers in the region in order to successfully capture certain targeted industries. A corridor plan modeled with a market study can also

more accurately reflect the land demands required to capture projected employment growth.

The comprehensiveness of a market study is dependent upon existing County resources. This being said, a market study can evaluate the corridor's economic development potential, challenges for development, and its competitiveness with other areas in the County and the region. The study can also assess short- and long-term market trends for various industry sectors, opportunities for the County to capture targeted industry sectors, and inducements needed to make the area more competitive. Field research, such as the stakeholder interviews and public dialogue conducted as part of the Route 28 Business Outreach Project, would appropriately supplement a market study. The market study can test and validate many of the observations and perceptions given through the project.

2. The corridor can be planned as a series of districts that reflect preferred development patterns unique to each area

The Route 28 Corridor is a large area that contains over 8,000 acres, a variety of existing uses, and natural resources. Areas of the corridor, therefore, contain unique characteristics and circumstances. The potential for any planning within the corridor could result in different development patterns that are based on differing sets of community goals and objectives. Acknowledging this early on in any planning process by planning the corridor as a group of inter-related districts may be a logical approach.

3. Land Uses in the Route 28 corridor reflect a predominantly employment-based corridor

Overall, stakeholder comments validate the corridor's importance to the County as an employment corridor, given its strategic advantages and the long-term potential to capture Class A office. As such, the overall

land use mix for the corridor should reflect a predominantly employment-based corridor.

4. Properties adjacent to Route 28 and its parallel roads are reserved for Class A office and compact, higher intensity, pedestrian-oriented business nodes

Route 28 offers two strong advantages for businesses looking to locate in Loudoun County - high visibility and proximity to the interstate network and Dulles Airport. Combined with the conversion of Route 28 to a limited access freeway, these advantages are appealing to businesses that want to locate within an area that gives them timely and cost-efficient access to major markets along the east coast and to national and international destinations. The County should therefore continue to reserve areas adjacent to Route 28 for high-quality Class A office. The County should also consider how the Destination Retail Overlay is promoting uses that are not only competing with Class A office for prime land, but also reducing the competitive advantage that Route 28 affords businesses looking to locate in the corridor.

Higher-intensity, compact nodal development is a way to provide both Class A office and amenities for Class A office users while using valuable land more efficiently. Current Keynote Employment planned along the corridor calls for campus-style office parks defined by large setbacks and significant areas of open space. This is in stark contrast to the stakeholders' vision of compact, higher-intensity, pedestrian-oriented business nodes at strategic locations along the corridor. Regional, national, and international businesses who locate in the corridor create a multiplier effect, in that they generate and attract a demand for supportive services which in return attract additional business users to the corridor. More compact and pedestrian-oriented nodes will place these mixes of services within proximity of each other and to

employees who can access amenities without getting into their cars. Higher intensity nodal development also reserves land elsewhere in the corridor for parks, open space, civic uses and lower-intensity land uses such as industrial and Keynote Employment.

5. Areas for industrial development are reserved and clustered in appropriate locations

Stakeholders note that industrial uses have been sustained by the presence of Dulles Airport and are important to the economy of the County. These uses should be planned and clustered in appropriate locations within the corridor. Industrial users prefer to be clustered near the transportation network for purposes of freight and cargo distribution and to isolate the impact of these uses on adjacent developments. The Route 606 corridor provides a good example of an area that provides existing and future industrial users with critical access to the road transportation network and immediate access to Dulles Airport.

Reserving Class A office adjacent to Route 28 for the long-term will require redevelopment of many industrial properties. Owners of existing industrial uses will find it difficult to relocate their businesses elsewhere in the County. Therefore, the County should identify opportunities and incentives that offer businesses a chance to voluntarily relocate to areas planned industrial.

6. Mixed-use nodes are located where they contribute to or support employment and business development

Stakeholders suggested identifying mixed-use locations that include residential. Residential in mixed-use developments may contribute to or support employment and business development by:

- Providing greater opportunities for employees to live near their work, thereby reducing the amount of vehicles on the roadway;

- Offering employees diverse housing choices at a variety of housing price points;
- Attracting quality amenities and retail to the area.

Generally, developers look at three site selection criteria when considering mixed-use developments - high visibility, accessibility, and proximity. These criteria can be considered when identifying potential mixed-use nodes in the corridor. Mixed-use nodes also provide opportunities to incorporate workforce housing and a variety of residential types in a vibrant setting; quality-of-life factors that employers look for in site selection and the decisions that employees make on whether or not they want to move to a new area.

Any planned residential in the area should take into consideration existing environmental constraints, including airport noise contours, aircraft overflights, and compatibility with adjacent uses. Furthermore, the planning of residential should only be considered if it is determined that buy-out of residential in the Route 28 Tax District by developers will not detrimentally impact the ability of the County to meet its debt obligations and may even generate a greater return on commercial investment.

7. Keynote Employment areas are retained in the corridor, but strategically located

With its sprawling campus concept, keynote employment centers may not be the most efficient use of land for economic development, but stakeholders believe that there still is a market for Keynote Employment-types of land development, as envisioned by the Revised General Plan. As such, areas should be identified and reserved for this land use type. For instance, stakeholders believe the corridor's proximity to Washington D.C. can attract government agencies, federal defense contractors, and other

government-related industries that require a highly secure site. Keynote Employment could serve as an incentive to attract these types of users to the corridor.

8. Route 28 Corridor planning takes advantage of its proximity to Dulles Airport

Many airport-dependent industries such as transportation, warehousing and wholesale trade have historically located within areas around major airports for the efficient transport and movement of goods. Economic trends, however, are leading towards globalization, advanced technologies, advantages of speed, and shifts to service from manufacturing economies. Major airports can become central to capturing airport-related industry sectors that take advantage of these trends. These industry sectors include companies that produce microelectronics, pharmaceuticals, aerospace components, and medical devices that rely on time-sensitive manufacturing and distribution. Corporate headquarters can also choose to locate near airports for employee mobility in order to establish, facilitate, or maintain business relationships, or to periodically gather staff from far-flung locations.

Dulles Airport is a major presence and asset within the Route 28 Corridor. The airport's D2 program is making infrastructure and operational improvements that will double its passenger and cargo capacity. The Route 28 Corridor can take advantage of this increased capacity by planning the corridor to capture more airport-related industries. The corridor can also capture other supportive businesses, including hotels, conference and exhibition facilities, specialty restaurants, and entertainment zones that desire to locate near the airport to accommodate same-day and overnight business travelers, airport employees, and employees from surrounding developments.

Airport-centric development is increasingly becoming just as important as Central Business Districts (CBDs) in shaping land development patterns within a region. In this regard, the keynote speaker at the Board Forum, Dr. Stephen J. Appold of the Kenan Institute of Private Enterprise (Institute) at the University of North Carolina, posed the "aerotropolis" and its possible application for Dulles Airport and the Route 28 Corridor.

The "aerotropolis" is a planning model that requires coordination between airport planners and adjacent jurisdictions to create a coherent plan. The "aerotropolis" views major airports as central cores, or airport-cities, with corridors and nodes of airport-related businesses separated with sufficient green space and linked together by express lanes (aerolanes) and express trains (aerotrans).

On-airport (inside-the-fence) planning, however, typically takes place in isolation from general land use and transportation planning (outside-the-fence). According to Dr. John Kasarda, Director of the Institute, this leads to development that is "spontaneous and haphazard, ugly, and unsustainable from an environmental standpoint." Because the "aerotropolis" model, as Kasarda states, calls for "both planning vision and coordinated action" the likelihood that such development will be economically efficient, aesthetically pleasing, and environmentally sustainable is increased.

A list of aerotropolis sources used to develop this principle and for further reference is included at the end of this report.

9. The corridor incorporates high-quality design practices into development

Stakeholders describe the corridor as suffering from an image and prestige problem that may be hurting its ability to attract businesses to the corridor. Image and prestige are factors that regional,

national and international companies consider when evaluating site selection criteria - certain employers desire to be within areas that are attractive for their employees to entice them to move, keep them employed, and attract top talent.

Planning in the corridor should consider development standards for areas that speak to building form and placement, building articulation, parking, streetscape, and signage that ensure high-quality design and that set the standard for development in the corridor. Development standards should also consider a beautification plan for the corridor to better tie development on both sides of Route 28 and create a more aesthetically pleasing corridor.

10. The corridor includes destinations that create a “sense of place”

“Places” tend to be areas that offer pedestrian-oriented environments, vibrant civic spaces, and greater weekend and nighttime activities. Many stakeholders describe the corridor as lacking any “sense of place.” Any land use strategy for the corridor should consider development that creates “places” that are attractive to a broad spectrum of employees, including younger and single professionals who work in nearby office developments and at Dulles Airport. A landmark development project, such as a performing arts center, convention center, cultural and entertainment center, mixed-use center, or high-quality, compact office park could be a “place” that is also a catalyst for further and greater investment in the corridor.

11. The intersection of Route 28, the Dulles Greenway, and the Dulles Toll Road/Access Road is a critical gateway into the County

The southern part of the corridor is also the central gateway into Loudoun County. Stakeholders note the predominance of industrial uses in this area and believe this sets a negative tone for Class A office development.

The intersection of Route 28, the Dulles Greenway, and the Dulles Toll Road/Access Road reflects a convergence of three critical transportation corridors in the Washington region. As such, this “crossroads” may be considered a high point for business access, proximity, and visibility. The County should take advantage of this by considering the development of a signature gateway that would form an attractive entrance into the County, and also capture a significant amount of employment. Two things need to be considered: 1.) A gateway may require multi-jurisdictional cooperation, and 2.) Any planned major intensification at this gateway would need to sufficiently mitigate any transportation impacts that may affect Dulles Airport and Loudoun County.

12. Land use planning takes into consideration established residential neighborhoods within and adjacent to the corridor

Although the Route 28 corridor is planned primarily as a keynote and business corridor, there are residential areas located within the corridor. Other planned residential communities are also located immediately adjacent to or within proximity of the corridor. Any planning effort should carefully consider uses, building forms, and building placements that may be incompatible or may have negative impacts on existing residential neighborhoods. Efforts should be made to transition and integrate planned uses with such neighborhoods.

13. The corridor contains a transit system that links development in the corridor with future metrorail

MWAA is overseeing the construction of the Dulles Corridor Metrorail Extension Project that currently includes two proposed transit stations likely to have the most significant affect on the Route 28 Corridor in terms of commuting patterns. Opportunities exist to develop a planned

transit network that includes either transit spurs or a looped system that links business districts with metrorail and with Dulles Airport. A seamless transit network means that employers can recruit from a regional labor pool that has greater reverse commute options for employees from the east. Employees who live near transit would also have the option of travelling to Dulles Airport or to their jobs without ever entering a car.

14. Transportation planning in the corridor should include opportunities for multi-modalism

Stakeholders note that roadways in the corridor have been developed with no consideration for a safe and connected pedestrian and bicycle network. On-going transportation planning in the corridor should consider street sections and streetscape designs that fit within the context of desired development patterns throughout various areas of the district. The end result should be a pedestrian and multi-modal network throughout the corridor that ties development, the planned transit network, and open space together in an interconnected system.

15. The Broad Run is a natural resource asset and recreational amenity

The Broad Run is a major tributary of the Potomac River and is the defining natural feature of the Route 28 Corridor. The forested lands that remain in the corridor are primarily associated with the Broad Run and its floodplain. This asset could be developed into a linear park that protects the river as a natural resource while integrating it into development as an amenity for businesses and their employees - including providing the opportunity for employees to bike and walk to work.

16. Encourage sustainable development practices in the corridor

Development in the corridor provides opportunities to pilot sustainability initiatives. Sustainable development,

sometimes referred to as green building, includes use of energy efficient building design and construction techniques along with land development practices to reduce the impact of the built environment on citizens and the land. Such measures include water conservation, energy reduction, and preserving environmentally-sensitive areas by using land efficiently. In the current market, companies are focusing more on cost-saving strategies which may jeopardize the interest in pursuing sustainable development strategies if it increases upfront costs. Therefore, the County would need to identify the right type of incentives to encourage participation in sustainable development practices.

Appendix B: Summary of SWOT Analysis Results

SWOT Analysis Economics/Market

Strengths

- Commercial growth is generating sufficient special tax revenue to meet debt obligations of the Route 28 tax district
- Route 28 offers employers timely access to Dulles Airport and the interstate network
- The provides companies with a highly-educated, affluent, and diverse workforce and customer base for goods and services
- Employees can choose to live in an area with diverse housing options, good schools and quality health care
- Businesses that locate adjacent to Route 28 have high visibility for their employees and customers
- Washington Dulles International Airport is a major asset and economic engine for the region
- The steady demand for flex/warehouse is driven largely by the presence of Washington Dulles International Airport
- There is a market for Keynote Employment

Weaknesses

- The corridor is at a competitive disadvantage when competing with other jurisdictions for Class A office
- Properties are not being planned to their highest and best uses
- The Class A office market has yet to mature
- Existing users have no incentive for redevelopment
- Destination Retail is competing with Class A office
- Keynote Employment offers limited services and amenities to recruit national and international businesses

Opportunities

- The corridor offers great long-term potential for Class A office development
- Economic development can be facilitated with the arrival of metro
- There are still large undeveloped or underdeveloped properties in the corridor for developers to work with
- The Board of Supervisors proactive stance with the corridor is good for economic development
- The corridor's proximity to Dulles Airport and the interstate network offers companies access to a timely and cost-efficient goods and services distribution network and employee mobility to east coast, national and international destinations
- Branding the Route 28 corridor as a premier international gateway to Loudoun County and the larger region and a hub for regional, national, and international business and trade
- The quality, landmark development project can be a catalyst for the spin-off of other high quality developments
- A plan should consider areas that offer "legacy users" a chance to voluntarily relocate
- A detailed master plan can better position the County to utilize land to their highest and best uses
- The corridor's proximity to Washington D.C. is an opportunity to attract government-agencies and contractors within a highly secure office campus setting

Threats

- Current development patterns are limiting the potential for greater tax revenues that can increase the percentage of the County's tax base from commercial development
- Current market conditions and slowdown of the economy is resulting in a higher tax rate, limited credit availability, and vacancy rates that are higher compared to the rest of the region
- Small, unconsolidated parcels are causing difficulties for developers to come in with unified development proposals that include large-scale, higher-intensity Class A office with amenities
- Other planned TODs and mixed-use developments in the County and region will compete against Route 28 corridor development
- Older "legacy users" will find it hard to relocate their businesses elsewhere in the County
- The County's inability to compromise on environmental matters in the corridor is hurting economic development

SWOT Analysis

Transportation

Strengths

- Transportation improvements To Route 28 are resulting in increased capacity and improved traffic flow

Weaknesses

- Transportation improvements on Route 28 are limiting access to older and established areas
- Route 28 roadway improvements have created a dangerous and confusing traffic pattern at certain intersections
- The lack of a Potomac River Crossing to connect Route 28 with the I-270 corridor in Maryland is not advantageous for economic development in the corridor
- The conversion of Route 28 to a limited access roadway has served to only facilitate through commuter traffic from the south and west partly due to the high toll rates of the Dulles Greenway
- Roadways in the corridor have been developed with no consideration for a safe and connected pedestrian and bicycle network

Opportunities

- Transportation spurs or a looped transit system can link Class A office development in the corridor to the planned metro stations and Dulles Airport while creating greater reverse commute options for employees from the east
- Accelerate road construction within the corridor to complete the planned transportation network, including the Moran Road extension, Atlantic Boulevard, Pacific Boulevard, and the Dulles Loop, and to facilitate economic development
- A beautification plan for the corridor will help to better tie development together on both sides of Route 28 and create a more aesthetically pleasing corridor
- The Broad Run can provide opportunities for employees to bike and walk to work

Threats

- Allowing right-in/right-out access to Route 28 defeats the objectives of converting the roadway to a limited access freeway
- The Dulles Greenway toll rates are causing congestion on Route 28 and other roads
- The build-out of the corridor could negatively impact access to the airport and increase congestion along Rt. 28
- Route 28 improvements have created a dangerous and confusing traffic pattern at the interchange of Route 28 and Waxpool Road

SWOT Analysis Design

Strengths

- The Broad Run is a natural resource asset

Weaknesses

- The corridor is not developing in the way envisioned by the RGP
- The image of corridor is of one lacking high quality development
- The Destination Retail Overlay conflicts with the County's vision of the corridor and is sending a confusing message to developers and the public
- The corridor is lacking "places" that are attractive to a broad spectrum of employees, including younger and single professionals who work in nearby office developments
- Route 28 is a concrete superhighway that does not have the greenery and aesthetic appeal of the Route 7 and Dulles Greenway corridors

Opportunities

- An attractive gateway at the southern end of the corridor can encourage revitalization to the north
- Reserve larger-scale Class A office integrated with higher-quality retail adjacent to Route 28
- Locate low-rise, lower-intensity industrial development away from Route 28 and towards Dulles Airport
- Strategically locate clusters of higher-intensity, pedestrian nodes in the corridor
- The planned metro stations provide opportunities for mixed-use nodes
- Create "places" that offers greater weekend and nighttime activity
- Development can be transitioned east of Route 28 to be compatible with existing residential neighborhoods
- The Broad Run can be transformed into a linear park

Threats

- The corridor offers no areas with the amenities that appeal to younger professionals
- Route 28 is creating a physical barrier between Sterling and development to the west that precludes any opportunities to tie development together
- Small, unconsolidated parcels and disjointed development are causing difficulties in a consistent development pattern along the corridor

SWOT Analysis

Regulatory/Programmatic

Strengths

- The Revised 1993 Zoning Ordinance allows for more uses and services than the 1972 Zoning Ordinance
- The simplified zoning conversion process has been implemented and tested

Weaknesses

- The Revised 1993 Zoning Ordinance does not include enough incentives to view conversion as a viable trade-off
- Underlying zoning predominantly supports by-right industrial development options and discourages Class A office
- Maximum FARs in existing districts are too limiting for larger-scale, higher intensity Class A office
- The legislative review process is lengthy, cumbersome, costly, and uncertain approval process
- Sign regulations in the Revised 1993 Zoning Ordinance are more limiting and restrictive than sign regulations in the 1972 Zoning Ordinance
- Property owners and brokers are not aware or do not understand the differences/advantages between the various ordinances
- Existing zoning districts contained within the Route 28 Corridor under the Revised 1993 Zoning Ordinance do not offer what people want to build
- Many properties in the corridor are less than 20 acres and do not meet current zoning ordinance requirements for minimum district size

Opportunities

- Simplify and stream-line legislative, by-right, and conversion processes for projects within the Route 28 corridor
- Apply fee waivers for zoning conversions and rezoning
- Simplify the sign ordinance
- Revise and create zoning districts and overlays to provide incentives, flexibility, and by-right development options
- Educate landowners about the differences between the three zoning ordinances and the simplified conversion process
- A detailed master plan to provide a clear vision and expectations for development that can in turn reduce the uncertainty of the legislative approval process
- Consider a lot consolidation incentive
- Provide a workforce housing credit
- Reward sustainable development
- Strengthen and enhance economic development efforts

Threats

- A lengthy and cumbersome legislative review process makes it difficult to property owners to quickly respond to market advantages
- More restrictive regulations in the Revised 1993 Zoning Ordinance are limiting the economic potential of land in the corridor and driving up development costs
- The low FAR is too limiting for investors and developers and is encouraging flex-industrial uses
- Fairfax County existing planning and zoning allows high intensity office development by-right and developers and property owners know and understand the ordinance
- The County is losing tenants and business to other jurisdictions due to sign regulations in the Revised 1993 Zoning Ordinance